



San Francisco HOUSING INVENTORY



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- 1 Kelly Cullen Community House – 220 Golden Gate Avenue – 174 affordable rental units; conversion of historic Central YMCA building
- 2 Arc Light Co. – 21 Clarence Pl – 94 rental units with 19 inclusionary below market rate units; conversion of historic California Electric Light Building
- 3 2020 Ellis – 21 market rate units; new construction
- 4 Veterans Commons – 150 Otis Street – 76 affordable rental units; conversion of historic Juvenile Court and Detention Center

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Introduction

The *Housing Inventory* is the Planning Department's annual survey of housing production trends in San Francisco. It has reported changes in the City's housing stock, including housing construction, demolition, and alterations, since 1967. This report is 43rd in the series and presents housing production activity during 2012.

By monitoring changes in San Francisco's housing stock, the *Housing Inventory* provides a basis for evaluating the housing production goals and policies of the *Housing Element* of the *San Francisco General Plan*. Housing policy implications that may arise from data in this report, however, are not discussed here.

The *Housing Inventory* reports housing production, which begins when a building permit application for a project is filed with the City. The application is first reviewed by the Planning Department for compliance with the *Planning Code*, zoning, and other applicable policies. If the Planning Department approves the project, the Department of Building Inspection (DBI) reviews the application for compliance with the Building Code. If DBI approves the application, it issues a permit authorizing construction. The next step is for the project sponsor to begin construction on the project. Once construction has been completed and passed all required inspections, DBI issues a Certificate of Final Completion (CFC) for the project.

The *Housing Inventory* also reports the annual net gain in housing units citywide and by planning district. Net gain is the number of newly constructed units with CFCs issued, adjusted for alterations – which can add or subtract units – and demolitions. Affordable housing, condominiums, and changes in the residential hotel stock are other areas of interest covered by the *Housing Inventory*. In addition, the report provides a regional perspective by examining housing construction activity and home prices for the nine-county Bay Area region. Finally, major projects completed, authorized, under review, or in

the pipeline are listed in Appendix A. The *Housing Inventory* also summarizes housing production trends in the Better Neighborhoods and Eastern Neighborhoods plan areas in Appendix B. These plan areas have separate monitoring reports that detail housing production trends.

This report was prepared from information received from a number of different sources including the Department of Building Inspection, the Department of Public Works and Planning Department records. The Mayor's Office of Housing, the San Francisco Housing Authority and the Office of Community Investment and Infrastructure (Successor Agency to the San Francisco Redevelopment Agency) provided information on affordable housing projects. The California Homebuilding Foundation/Construction Industry Research Board provided Bay Area building permit data. The California Association of Realtors provided housing costs. Project sponsors also contributed data.

Copies of this report can be downloaded from the Publications & Reports link at the Planning Department's web site at <http://www.sfplanning.org>.

A limited number of copies are available for purchase from the Planning Department, 1650 Mission Street, Suite 400, San Francisco, CA 94103. Copies may also be reviewed at the Government Information Center on the fifth floor of the San Francisco Main Library.

Department Staff Contact for this report is Teresa Ojeda, (415) 558-6251, teresa.ojeda@sfgov.org

Key Findings

Housing Production

- New housing production in 2012 totaled 1,471 units. This includes 794 units in new construction and 677 new units added through conversion of non-residential uses or expansion of existing structures.
- Some 154 units were lost through demolition, unit mergers, or removal of illegal units.
- This year saw a net addition of 1,317 units to the City's housing stock, a fivefold increase from 2011. This represents about 84% of the 10-year average but nevertheless is a significant rebound from the previous year's lowest production point in decades.
- By the end of 2012, there were approximately 374,150 dwelling units in San Francisco. Approximately 33% are single-family homes, 32% are in buildings with two to nine units, and 36% are in buildings with 10 or more units.
- In 2012, 3,888 units were authorized for construction. This represents a 90% increase over 2011. New housing authorized for construction over the past five years continues to be overwhelmingly (86%) in buildings with 20 or more units.
- The Planning Department approved and fully entitled 48 projects in 2012. These projects propose a total of 2,310 units.
- In 2012, 976 new condominiums were recorded – a 40% decrease from 2011. A majority (81%) of those units were in buildings with 20 units or more. Condominium conversions increased slightly in 2012 – 488 units or 3% more than those converted in 2011.
- Much of the new housing development in 2012 was concentrated in the South of Market planning district, where over half (53%) of new units were built; it is followed by Downtown and Ingleside, with 15% and 14% share respectively of new housing constructed.

Affordable Housing

- In 2012, new affordable units made up 35% of new units added to the City's housing stock. Moreover, these 512 new affordable housing units are more than double that of the previous year's affordable housing production. This count includes 121 inclusionary units and 36 additional units built in existing structures.
- About 80% of the new affordable units are rentals affordable to very-low and low-income households.

Housing Production Process

The *Housing Inventory* describes net changes in the housing stock and details units that have been certified complete, units that were authorized for construction, and units that are under review by the Planning Department.

The housing production process begins with a project review by the Planning Department and ends with the issuance of a Certificate of Final Completion (CFC) by the Department of Building Inspection (DBI). Figure 1 outlines the main stages of the housing production process.

Units Reviewed by Planning Department and DBI

For most major projects, review by the Planning Department is the first step in the process. Proposals are reviewed by the Planning Department for compliance with the *Planning Code*, the *General Plan*, environmental requirements, and other regulations and policies. Generally, only major projects require special Planning Department approvals, such as a conditional use permit or variance. The number and type of projects undergoing Planning Department review are indicators of current building interest and production expectation within the next two to five years. Following Planning Department approval and entitlements, the Department of Building Inspection (DBI) reviews the project for compliance with the *Building Code*.

Units Authorized for Construction

If DBI approves the project following its own review, it issues building permits authorizing con-

struction. Projects with approved building permits generally start construction within 90 days from the date the permit is issued. Start of construction, however, may be delayed for up to a year. If the permit is not picked up or acted on within 90 days, the permit expires. The number of units authorized for construction is a key indicator of future housing construction.

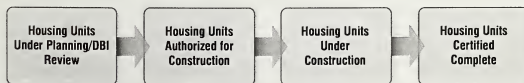
Units Certified Complete

Projects are inspected by DBI at various stages throughout the construction process. However, inspectors only issue Certificates of Final Completions (CFCs) for projects that are deemed 100% complete. Units certified complete are an indicator of changes to the City's housing supply and include units gained or lost from new construction, alterations, and demolitions.

For the purposes of this report, however, units that have received Temporary Certificates of Occupancy (TCOs) or "Final Inspection Approval" from the Department of Building Inspection are also considered and counted as completed units.

Housing production is measured in terms of units rather than projects because the number of units in a project varies. Not all projects reviewed or approved are built. A project's building permit application may be withdrawn, disapproved, or revised; its permit may also expire if, for example, a project is not financed. Housing production is also affected by changes in market conditions and the economy. However, once building construction starts, a project is usually completed within one to two years, depending on the size of the project.

FIGURE 1.
The Housing
Production Process



Housing Stock

The number of units in San Francisco's housing stock is derived by taking the total units from the decennial census count as baseline, then adding net unit change each subsequent year until the next census. Because the 2010 Census did not collect detailed housing characteristics, this 2012 Housing Inventory uses data from the 2010 Five Year American Community Survey (2010 ACS5). Annual net unit change – the sum of units completed from new construction and alterations minus units lost from demolition and alterations – will be added to this 2010 ACS5 baseline count.

According to the 2010 ACS5, housing units in San Francisco totaled 372,560, with near equal distribution between single family units (33%), moderate density buildings (two to nine units – 31%), and

higher density structures (10 or more units – 35%). This distribution will likely change in the next few years as the trend has been moving towards increasingly larger buildings.

In 2012, there was a net gain of 1,317 units in the City's housing stock. As of December 2012, units in buildings with 20 or more units comprised just over 25% of the City's total housing. Of all units added since the 2010 ACS5, 87% have been in buildings with 20 units or more.

Table 1 provides a profile of San Francisco's housing stock by building type from 2000 through 2012. Figure 2 illustrates San Francisco's housing stock by building type for 2012.

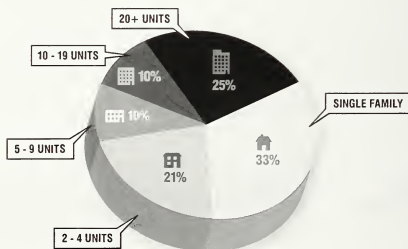
TABLE 1.
San Francisco Housing Stock by Building Type, 2010-2012

Building Type	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20 + Units	Total
2010 ACS5	123,951	79,774	37,088	37,656	93,496	372,560*
Net Addition 2011-2012	31	87	7	80	1,381	1,586
Total	123,982	79,861	37,095	37,736	94,877	374,146

Source: U.S. Census Bureau; Planning Department

* This total includes other "housing" types that the Census Bureau counts, such as mobile homes, RVs, vans, and houseboats.

FIGURE 2.
San Francisco Housing Stock
by Building Type, 2012



Housing Production Trends

New Housing Construction

- New construction in 2012 – 794 units – is a significant twofold increase from 2011. New construction in 2012 is just 42% of the 10-year average of 1,886 new construction units.
- Conversion of non-residential uses resulted in 616 new units and another 61 new units were added through expansion of existing structures. However, 27 units were lost due to removal of illegal units, mergers, conversion to non-residential use and to corrections to administrative records.

This means a net addition of 650 units increased the City's housing stock through "alterations" of existing units or buildings. This represents a very dramatic recovery from the five net units added in 2011 as a result of alterations.

- The number of demolitions in 2012 – 127 units – is 151% more than that of the previous year. The bulk of these demolitions (113 units or 89%) were lost as part of the Hunters' View revitalization, a 267 unit SF Hope project.
- The net addition to the City's housing stock grew almost fourfold from 2011. This 2012 net new unit count of 1,317 is, however, still lower than the 10-year average of 1,985 units.
- Affordable units made up 35% of new units built in 2012.
- In 2012, the Department of Building Inspection (DBI) authorized 3,888 units for construction according to building permitting data. That number represents a 195% increase over permits authorized in 2011.

Table 2 and Figures 3 and 4 show housing production trends over the past 20 years. The table and figures account for net new units gained – which is the number of units newly constructed and adjusted for alterations, which can add or subtract units, and demolitions. Figure 5 illustrates five-year housing production activity from 2008-2012.

Some of the larger projects completed in 2012 include: Madrone/435 China Basin (319 units), Potrero Launch/2225-3rd Street (196 units), Kelly Cullen Community House (174 affordable units), Avalon/1150 Ocean (173 units), Arc Light Co./178 Townsend (94 units), and Veterans Commons/150 Otis (76 affordable units).

A list of all market rate projects with 10 units or more completed in 2012 is included in Appendix A-1. Major affordable housing projects completed in 2012 are listed in Appendix A-2.

TABLE 2.

San Francisco Housing Trends, 1993-2012

Year	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change in Number of Units
1993	1,001	379	26	-65	288
1994	948	1,234	25	-23	1,186
1995	525	532	55	-76	401
1996	1,228	909	278	52	683
1997	1,666	906	344	163	725
1998	2,336	909	54	19	874
1999	3,360	1,225	98	158	1,285
2000	2,897	1,859	61	-1	1,797
2001	2,380	1,619	99	259	1,779
2002	1,478	2,260	73	221	2,408
2003	1,845	2,730	286	52	2,496
2004	2,318	1,780	355	62	1,487
2005	5,571	1,872	174	157	1,855
2006	2,332	1,675	41	280	1,914
2007	3,281	2,197	81	451	2,567
2008	2,346	3,019	29	273	3,263
2009	742	3,366	29	117	3,454
2010	1,203	1,082	170	318	1,230
2011	2,033	348	84	5	269
2012	3,888	794	127	650	1,317
Total	43,394	30,695	2,489	3,072	31,278

Source: Planning Department

Note: Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

FIGURE 3.

20-Year Housing
Production Trends,
1993-2012

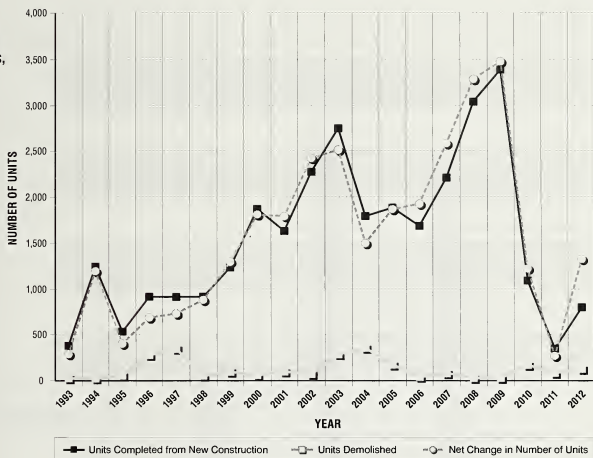


FIGURE 4.

Units Authorized
and Completed,
1993-2012

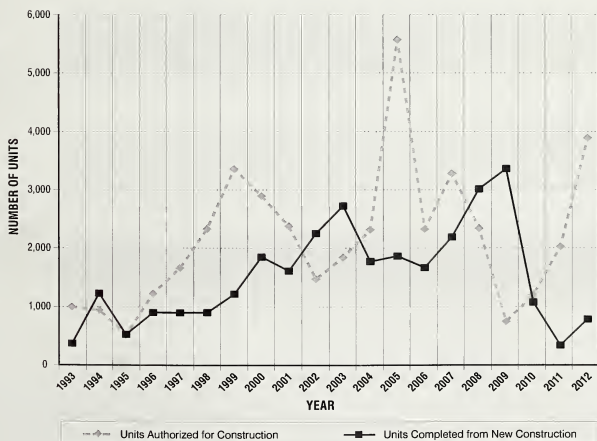
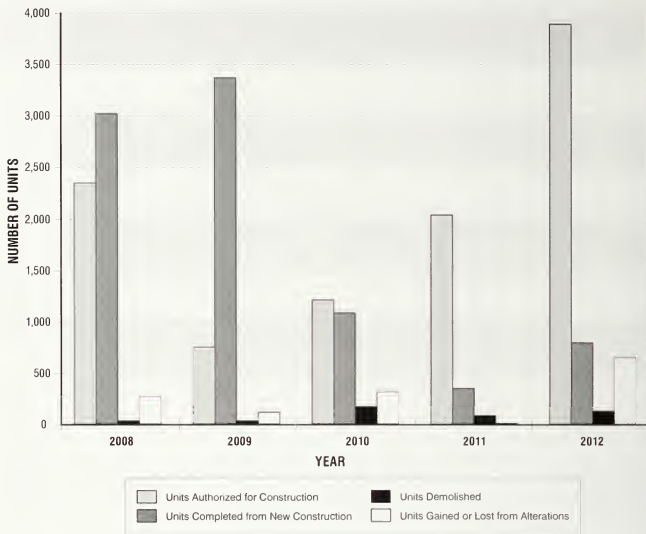


FIGURE 5.

Units Authorized and Gained from New Construction, Alterations, and Demolitions, 2008-2012



Projects Approved and Under Review by Planning

Depending on the type of project, there are various approvals by the Planning Department that a project needs to be fully entitled. Full entitlement of a project means that the project sponsor can proceed with the next step in the development process: securing approval and issuance of the building permit.

- In 2012, 72 projects with about 2,115 net units were filed with the Planning Department. This number is more than twice the count in 2011 (1,020 units) but is about 23% less than the five-year average (2,760).
- The Planning Department approved and fully entitled 46 projects in 2012. These projects propose a total of 2,751 units.

- As of December 31, 2012, the total number of units under review at the Planning Department was over 12,792 units.

Table 3 shows the number of housing projects filed with the Planning Department over the last five years. It is important to note that Planning may not approve all projects under review or may not approve projects at the unit levels requested. Project sponsors may also change or withdraw the project proposals. Some projects listed in Table 3 as undergoing Planning Department review may have reached their approval stage, been authorized for construction, or may have been completed. Lastly, many of the housing projects under development by the Office of Community Investment and Infra-

structure (the Successor Agency to the San Francisco Redevelopment Agency) may not show up in Table 3 because the agency is responsible for the review of those projects.

Very large projects (100 units or more) filed in 2012 and are under Planning Department review include: 100 Van Ness (399 units); 401 Harrison Street (299 units); 5800 - 3rd Street (271 units); 800 Brotherhood Way (182 units); 325 Fremont Street (119 units); and 923 Folsom Street (114 units).

Appendix A-3 records major projects (10 units or more) that received Planning entitlements in 2012. Appendix A-4 contains a list of the major projects

(10 or more units) filed at the Planning Department for review during 2012.

Units Authorized for Construction

- In 2012, DBI authorized 3,888 units for construction, almost double that authorized in 2011. This number is also 90% higher than the five-year average (2,037). Since units authorized for construction is one of the indicators of future housing construction, the number of new units completed is expected to increase over the next few years.
- There were less projects authorized in 2012: 125 compared to 152 projects in 2011. However, the average project size was 31 units, far higher than the 13 unit average project size for the previous year.

TABLE 3.

Projects and Units Filed at Planning Department for Review, 2008-2012

Year	Projects Filed	Units Filed
2008	145	7,761
2009	85	902
2010	72	2,001
2011	52	1,020
2012	72	2,115
Total	426	13,799

Source: Planning Department

Table 4 summarizes the number of projects and units by building type authorized for construction by the Department of Building Inspection (DBI).

Some of the major projects authorized for construction during the reporting year include: 100 Van Ness (399 units); 1380 - 7th Street (393 units); 45 Lansing (320 units); 401 Harrison (312 units); 900 Folsom (282 units); 55 - 9th Street (273 units); 690 Long Bridge (273 units); 701 Long Bridge (188 units); 240 - 5th Street (182 units); 1200 - 4th Street (172 units); 1998 Market Street (114 units); and 2121 - 3rd Street (105

TABLE 4.

Units and Projects Authorized for Construction by DBI by Building Type, 2008-2012

Year	Units by Building Type					Total	Projects
	Single Family	2 Units	3 to 4 Units	5 to 19 Units	20+ Units		
2008	64	141	69	120	1,952	2,346	225
2009	37	71	51	106	487	752	135
2010	45	69	55	128	906	1,203	142
2011	24	77	55	121	1,745	1,998	152
2012	22	66	33	107	3,660	3,888	124
Total	192	424	274	582	8,715	10,187	778

Source: Planning Department

units). Appendix A-5 lists all projects with five or more units authorized for construction in 2012.

Demolitions

- A total of 127 units were demolished in 2012. This is 51% more than the number of units demolished in 2011 (84). Majority of the demolitions (113 units or 89%) is attributed to the demolition in Hunters' View as part of the revitalization and new construction of the 267-unit Hope SF project.
- The demolition of 127 units in 2012 is 44% above the five-year demolition average of 88 units.
- In 2012, 115 units or 91% of all demolitions were in an RM-1 zoning district.

Table 5 shows the units demolished between 2008 and 2012 by building type and Table 6 shows the demolitions in 2012 by zoning district.

It should be noted that city policies require a minimum of one to one replacement of demolished housing.

Alterations and Conversions

The majority of building permits issued by DBI are for residential alterations. These alteration permits are for improvements within existing buildings or dwelling units. Some alterations expand the building envelope without increasing the number of units in the building. The *Housing Inventory* is primarily concerned with alterations which result in a net loss or gain in the total number of units in the housing stock.

Dwelling units are gained by additions to existing housing structures, conversions to residential use, and legalization of illegal units. Dwelling units are lost by merging separate units into larger units, by conversion to commercial use, or by the removal of illegal units.

- The net gain of 650 units from alterations in 2012 is comprised of 677 units added and 27 units eliminated.

- Net units gained through alterations increased dramatically from net units gained the previous year – 650 units in 2012 compared to five in 2011. This rapid rebound can be attributed to the numerous projects that were temporarily sidelined as a result of the economic downturn of 2007-2008.
- Expansion and conversion projects, as well as legalization of secondary units, completed in 2012 resulted in the addition of 677 new units.
- Of the 27 units lost through alteration in 2012, two were illegal units removed, 23 units were lost due to mergers, one unit was converted to non-residential use, and an additional unit was a correction to official records. These represent a 59% decrease in units lost through alterations.

Table 7 shows the number of units added or eliminated through alteration permits from 2008 to 2012. Table 8 profiles the type of alterations and demolitions that caused the loss of units during the same period.

- The net total of 154 units lost in 2012 due to demolition or alteration is 3% more than that in 2011 when 146 total units were lost.

TABLE 5.

Units Demolished by Building Type, 2008-2012

Year	Buildings	Units by Building Type				Total
		Single	2 Units	3 to 4 Units	5+ Units	
2008	14	11	4	3	11	29
2009	14	20	6	3		29
2010	28	6	6	35	123	170
2011	17	12	2		66	84
2012	23	-	10	32	85	127
Total	96	49	32	73	285	439

Source: Planning Department

TABLE 6.

Units Demolished by Zoning District, 2012

Zoning District	Buildings	Units		Total	Percent of Total
		Single Family	Multi-Family		
RM-1	19	-	115	115	91%
NCT-3	2	-	4	4	3%
RH-2	1	-	2	2	2%
RH-3	1	-	6	6	5%
Total	23	-	127	127	100%

Source: Planning Department

TABLE 7.

**Units Added or Lost
Through Alteration Permits,
2008-2012**

Year	Units Added	Units Eliminated	Net Change
2008	321	48	273
2009	178	61	117
2010	356	38	318
2011	70	65	5
2012	677	27	650
TOTAL	1,602	239	1,363

Source: Planning Department

TABLE 8.

Units Lost Through Alterations and Demolitions, 2008-2012

Year	Alterations					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
2008	19	28	0	1	48	29	81
2009	2	42	5	12	61	29	90
2010	5	22	1	12	38	170	208
2011	39	22	1	3	65	84	149
2012	2	23	1	1	19	127	154
TOTAL	84	137	8	27	239	439	682

Source: Planning Department

New Housing Unit Trends

New construction and residential conversions are the primary engine behind changes to the housing stock. This section examines units added to the housing stock over the past five years by looking at the types of buildings and the zoning districts where they occurred. This section examines all units added to the housing stock in 2012, not just those added through new construction.

Types of Buildings

- New housing units added over the past five years continues to be overwhelmingly (87%) in buildings with 20 or more units.
- In 2012, 1,227 units were built in structures with 20 units or more. This is over four times more than that built in 2011. The share of units added in high-density buildings (20 or more units) is at par with the five-year average of 87%.
- Twenty-four single-family units were added in 2012, four more units than that added the previous year (20% increase). New units were also added in the "2 Units" category (40 units or 33% less than that built in 2011), in "3-9 Units" (82

units or 19% more than that completed in 2011), and in "10 to 19 Units" (98 units or 104% more than that built in 2011).

- Single-family and two-unit buildings construction made up a small proportion of new construction in 2012 (2% and 3%, respectively).

Table 9 shows new construction from 2008 through 2012 by building type. Figure 6 shows the share of new construction by building type for 2012.

New Housing Units Added by Zoning District

A quarter (25%) of new units built in 2012 were in neighborhood commercial districts; Mission Bay followed closely with 24%.

Table 10 summarizes new construction in 2012 by generalized zoning districts. Table 11 lists the number of units constructed in various zoning districts in the City. A complete list of San Francisco's zoning districts is included in Appendix C.

TABLE 9.
Housing Units Built by Building Type, 2008-2012

Year	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
2008	47	42	108	106	2,716	1,675
2009	36	88	94	71	3,077	3,366
2010	45	46	102	39	1,206	1,438
2011	20	60	69	48	221	418
2012	24	40	82	98	1,227	1,471
TOTAL	172	276	455	362	8,447	9,712
"Share of Total Units Added, 2008-2012"	2%	3%	5%	4%	87%	100%

Source: Planning Department

FIGURE 6.
Housing Units
Built by Building
Type, 2012

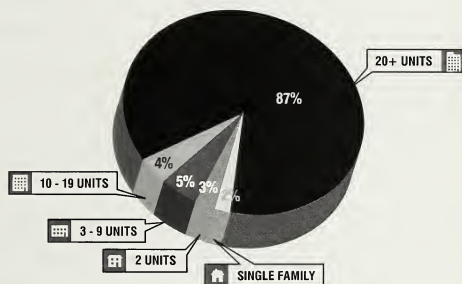


TABLE 10.
Housing Units
Added by
Generalized
Zoning, 2012

General Zoning Districts	Units	Percent of Total	Rank
Residential, House and Mixed	0	0.0%	1
Residential, Transit Oriented	10	0.8%	8
Neighborhood Commercial	254	19.3%	3
Neighborhood Commercial Transit	78	5.9%	2
South of Market Mixed Use	152	11.5%	4
Eastern Neighborhoods Mixed Use	197	15.0%	6
Chinatown Mixed Use	2	0.2%	5
Eastern Neighborhoods PDR	32	2.4%	7
Mission Bay	319	24.2%	
Public	76	5.8%	
Downtown Commercial	197	15.0%	
TOTAL	1,317	100.0%	

Source: Planning Department

TABLE 11.

Housing Units Added by Zoning District, 2012

Zoning Districts	Units	Percent of Total	Rank
C-3-G	193	14.7%	4
C-3-O(SD)	4	0.3%	22
CCB	2	0.2%	27
INNER CLEMENT NCD	1	0.1%	29
INNER SUNSET NCD	2	0.2%	28
MISSION BAY	319	24.2%	1
MUG	25	1.9%	11
MUO	14	1.1%	14
MUR	4	0.3%	23
NC-1	12	0.9%	15
NC-2	207	15.7%	2
NC-3	32	2.4%	9
NCT-3	36	2.7%	8
PDR-1-G	32	2.4%	10
PUBLIC	76	5.8%	6
RC-4	25	1.9%	12
RED	12	0.9%	16
RH-1	12	0.9%	17
RH-1(D)	3	0.2%	25
RH-2	11	0.8%	18
RH-3	16	1.2%	13
RM-1	(85)	-6.5%	31
RM-2	11	0.8%	19
RM-3	6	0.5%	20
RM-4	1	0.1%	30
RTO	4	0.3%	24
RTO-Mission	6	0.5%	21
SLI	94	7.1%	5
SLR	3	0.2%	26
UMU	197	15.0%	3
VALENCIA NCD	42	3.2%	7
TOTALS	1,317	100.0%	

Source: Planning Department

Condominiums

All condominium developments, whether new construction or conversions, are recorded with the Department of Public Works's (DPW) Bureau of Street-Use and Mapping (BSM). Annual condominium totals recorded by DPW do not directly correlate with annual units completed and counted as part of the *Housing Inventory* because DPW's records may be for projects not yet completed or from projects completed in a previous year. Large multi-unit developments also file for condominium subdivision when they are first built even though the units may initially be offered for rent. Condominium construction, like all real estate, is subject to market forces and varies from year to year.

New Condominium Construction

- In 2012, new condominium construction dropped from to 976 units from 1,625 units in 2011 (a decrease of 40%).
- About 81% of the new condominiums recorded were in buildings with 20 or more units (793 units or a 45% decrease from 2011).

Table 12 shows construction of new condominiums recorded by DPW over the past ten years and Table 13 shows new condominium construction by building type over the past five years.

TABLE 12.

New Condominiums Recorded by DPW, 2003-2012

Year	Units	% Change from Previous Year
2003	2,098	16%
2004	1,215	-42%
2005	1,907	57%
2006	2,466	29%
2007	3,395	38%
2008	1,897	-44%
2009	835	-56%
2010	734	-12%
2011	1,625	121%
2012	976	-40%
TOTAL	17,148	--

Source: Department of Public Works, Bureau of Street-Use and Mapping

TABLE 13.

New Condominiums Recorded by the DPW by Building Type, 2008-2012

Year	2 Units	3 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	Total
2008	64	106	70	112	1,545	1,897
2009	54	82	72	12	615	835
2010	22	24	21	0	667	734
2011	28	52	37	58	1,450	1,625
2012	34	51	22	76	793	976
TOTAL	202	315	222	258	5,070	6,067

Source: Department of Public Works, Bureau of Street-Use and Mapping

Condominium Conversions

The San Francisco Subdivision Code regulates condominium conversions. Since 1983, conversions of units from rental to condominium have been limited to 200 units per year and to buildings with six or fewer units. More than 200 units may be recorded in a given year because units approved in a previous year may be recorded in a subsequent year. The 200-unit cap on conversions can also be bypassed for two-unit buildings with owners occupying both units.

- Condominium conversions rose slightly in 2012 (488 from 472 conversions in 2011 or 3% increase). This number is 15% lower than the 10-year average of 570 units
- Almost 60% of units converted in 2012 occurred in two-unit buildings, representing an decrease of 4% from 2011.
- Eighty percent of the condominium conversions in 2012 (386) were in buildings with two or three units, compared to 82% in 2011.

Table 14 shows the number of conversions recorded by DPW from 2003-2012. Table 15 shows condominium conversions by building type over the past five years.

TABLE 14.

Condominium Conversions Recorded by DPW, 2003-2012

Year	Units	% Change from Previous Year
2003	432	15%
2004	303	-30%
2005	306	1%
2006	727	138%
2007	784	8%
2008	845	8%
2009	803	-5%
2010	537	-33%
2011	472	-12%
2012	488	3%
TOTAL	5,697	

Source: Department of Public Works, Bureau of Street-Use and Mapping

TABLE 15.

Condominium Conversions Recorded by DPW by Building Type, 2008-2012

Year	2 Units	3 Units	4 Units	5 to 6 Units	Total
2008	576	180	72	17	845
2009	508	141	132	22	803
2010	322	87	100	28	537
2011	302	87	72	11	472
2012	290	96	80	22	488
TOTAL	1,998	591	456	100	3,145

Source: Department of Public Works, Bureau of Street-Use and Mapping

Residential Hotels

Residential hotels in San Francisco are regulated by Administrative Code Chapter 41 — the Residential Hotel Conversion and Demolition Ordinance (HCO), enacted in 1981. The Department of Building Inspection (DBI) Housing Inspection Services Division administers the HCO. This ordinance preserves the stock of residential hotels and regulates the conversion and demolition of residential hotel units.

Table 16 reports the number of residential hotel buildings and units for both for-profit and nonprofit residential hotels from 2008 through 2012.

- As of 2012, 19,382 residential hotel rooms are registered in San Francisco; 72% are residential rooms in for-profit residential hotels and 28% are residential in non-profit hotels.
- Residential rooms in non-profit residential hotels have been increasing in the past five years. In the last five years, non-profit residential hotel rooms increased 7%.
- In for-profit residential hotels, residential rooms decreased while tourist rooms increased from 2011.
- The number of for-profit residential hotel buildings decreased in the past year, following slight declines in the four years previous: from 417 buildings in 2011 to 414 buildings in 2012.

TABLE 16.

Changes in Residential Hotel Stock, 2008-2012

Year	For Profit Residential Hotels			Non-Profit Residential Hotels		Total	
	Buildings	Resid. Rooms	Tourist Rooms	Buildings	Resid. Rooms	Buildings	Resid. Rooms
2008	419	14,160	2,998	85	4,978	504	19,138
2009	418	14,040	2,953	87	5,105	505	19,145
2010	412	13,790	2,883	87	5,163	499	18,953
2011	417	13,680	2,805	88	5,230	505	18,910
2012	414	13,903	2,942	87	5,479	501	19,382

Source: Department of Building Inspection

Affordable Housing

Standards and Definitions of Affordability

Affordable housing by definition is housing that is either rented or owned at prices affordable to households with low to moderate incomes. The United States Department of Housing and Urban Development (HUD) determines the thresholds by household size for these incomes for the San Francisco HUD Metro Fair Market Rent Area (HFMA). The HFMA includes San Francisco, Marin, and San Mateo counties. The standard definitions for housing affordability by income level are as follows:

Extremely low income: Units affordable to households with incomes at or below 30% of the HUD median income for the San Francisco HFMA;

Very low income: Units affordable to households with incomes at or below 50% of the HUD median income for the San Francisco HFMA;

Lower income: Units affordable to households with incomes at or below 60% of the HUD median income for the San Francisco HFMA;

Low income: Units affordable to households with incomes at or below 80% of the HUD median income for the San Francisco HFMA,

Moderate income: Units affordable to households with incomes at or below 120% of the HUD median income for the San Francisco HFMA; and

Market rate: Units at prevailing prices without any affordability requirements. Market rate units generally exceed rental or ownership affordability levels, although some small market rate units may be priced at levels that are affordable to moderate income households.

Housing affordability for units is calculated as follows:

Affordable rental unit: A unit for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco HFMA, utilities included;

Affordable ownership unit: A unit for which the mortgage payments, PMI (principal mortgage insurance), property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco HFMA median income, assuming a 10% down payment and a 30-year 8% fixed rate loan.

Inclusionary Affordable Housing Program units: These units are rental units for households earning up to 60% of the San Francisco median income, or ownership units for first-time home buyer households with incomes from 70% to up to 110% of the San Francisco median income.

Tables 17 and 18 show the incomes and prices for affordable rental and ownership units based on 2012 HUD income limits.

TABLE 17.
2012 Rental Affordable Housing Guidelines

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Rent
Extremely Low Income (30% of HUD Median Income)	1	Studio	\$21,650	\$509
	2	1 Bedroom	\$24,700	\$575
	3	2 Bedroom	\$27,800	\$640
	4	3 Bedroom	\$30,900	\$703
	5	4 Bedroom	\$33,400	\$738
	6	5 Bedroom	\$35,850	\$776
Very Low Income (50% of HUD Median Income)	1	Studio	\$36,050	\$869
	2	1 Bedroom	\$41,200	\$987
	3	2 Bedroom	\$46,350	\$1,104
	4	3 Bedroom	\$51,500	\$1,218
	5	4 Bedroom	\$55,650	\$1,294
	6	5 Bedroom	\$59,750	\$1,374
Lower Income (60% of HUD Median Income)	1	Studio	\$43,250	\$1,049
	2	1 Bedroom	\$49,450	\$1,193
	3	2 Bedroom	\$55,600	\$1,335
	4	3 Bedroom	\$61,800	\$1,475
	5	4 Bedroom	\$66,750	\$1,572
	6	5 Bedroom	\$71,700	\$1,673
Low Income (80% of HUD Median Income)	1	Studio	\$57,700	\$1,411
	2	1 Bedroom	\$65,900	\$1,605
	3	2 Bedroom	\$74,150	\$1,799
	4	3 Bedroom	\$82,400	\$1,990
	5	4 Bedroom	\$89,000	\$2,128
	6	5 Bedroom	\$95,600	\$2,270

Source: U.S. Department of Housing and Urban Development (HUD)

Note: Incomes are based on the 2012 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFMA). Rents are calculated based on 30% of gross monthly income. (FMR = Fair Market Rents)

TABLE 18. 2012 Homeownership Affordable Housing Guidelines

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Housing Expense	Maximum Purchase Price
Low Income <i>(70% of HUD Median Income)</i>	1	Studio	\$50,450	\$1,387	\$162,030
	2	1 Bedroom	\$57,700	\$1,587	\$187,664
	3	2 Bedroom	\$64,900	\$1,785	\$213,077
	4	3 Bedroom	\$72,100	\$1,983	\$238,491
	5	4 Bedroom	\$77,900	\$2,142	\$257,711
Median Income <i>(90% of HUD Median Income)</i>	1	Studio	\$64,900	\$1,785	\$225,945
	2	1 Bedroom	\$74,150	\$2,039	\$260,426
	3	2 Bedroom	\$83,450	\$2,295	\$295,128
	4	3 Bedroom	\$92,700	\$2,549	\$329,608
	5	4 Bedroom	\$100,150	\$2,754	\$356,127
Moderate Income <i>(110% of HUD Median Income)</i>	1	Studio	\$79,300	\$2,181	\$289,639
	2	1 Bedroom	\$90,650	\$2,493	\$333,408
	3	2 Bedroom	\$101,950	\$2,804	\$376,957
	4	3 Bedroom	\$113,300	\$3,116	\$420,726
	5	4 Bedroom	\$122,400	\$3,366	\$454,543

Source: U.S. Department of Housing and Urban Development (HUD)

Note: Incomes are based on the 2012 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFA). Monthly housing expenses are calculated based on 33% of gross monthly income. (FMR = Fair Market Rents). Maximum purchase price is the affordable price from San Francisco's Inclusionary Housing Program and incorporates monthly fees and taxes into sales price.

New Affordable Housing Construction

- Some 512 affordable units were completed in 2012, representing 35% of the new housing units added in 2012. Of these, 125 are on-site inclusion-ary affordable units.
- Very low-income units represented 70% of the new affordable units that were constructed in 2012; moderate income units made up about a fifth (20%).

Figure 7 shows affordable housing construction compared to market-rate housing construction from 2008 to 2012 by year and as a total.

Table 19 shows the production of affordable housing by levels of affordability and Table 20 shows new affordable housing by type. These numbers do not include affordable units that result from acquiring and rehabilitating residential buildings by nonprofit housing organizations. Those units are covered later in the report.

- The number of new affordable units produced in 2012 (512) is more than double that built in 2011 (218).

- Seventeen percent (17%) of the new affordable units in 2012 were units for homeowner units (87)
- A total of 36 units were added to existing residential buildings in 2012. Typically, these are smaller units and are sometimes referred to as secondary or “granny” units; these are also usually affordable to households with moderate incomes.

Major affordable housing projects completed in 2012 include: Kelly Cullen Community House/Golden Gate Avenue (174 units); Veterans Commons/150 Otis Street (76 units); 1345 Turk Street (32 units); and A Woman’s Place/1049 Howard Street (20 units).

All major (10 or more units) new affordable housing projects completed in 2012 are detailed in Appendix A-2. On-site affordable inclusionary units are listed under major market rate projects (Appendix A-1). Affordable housing projects under construction, or in pre-construction or preliminary planning with either the Mayor’s Office of Housing or the Successor Agency to the San Francisco Redevelopment Agency are presented in Appendix A-6.

FIGURE 7.

Development of Affordable and Market Rate Units, 2008-2012

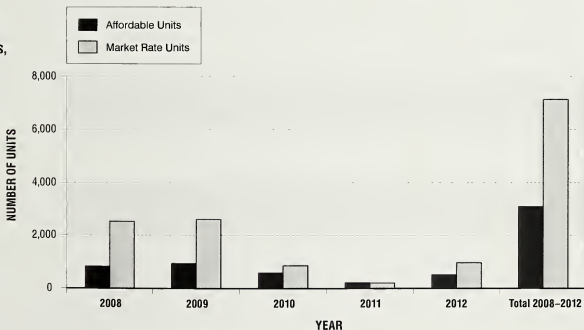


TABLE 19.

New Affordable Housing Construction by Income Level, 2008-2012

Year	Extremely Low (30% AMI)	Very Low (50% AMI)	Lower (60% AMI)	Low (80% AMI)	Moderate (120% AMI)	Total Affordable Units	Total All New Units	% of All New Units
2008	134	247	81	0	361	823	3,340	25%
2009	0	550	0	140	256	946	3,544	27%
2010	0	480	21	0	81	582	1,438	40%
2011	127	13	0	21	57	218	418	52%
2012	250	107	0	52	104	512	1,471	35%
TOTAL	511	1,397	102	213	859	3,081	10,211	30%

Source: Mayor's Office of Housing, Successor Agency to the Redevelopment Agency, Planning Department

TABLE 20.

New Affordable Housing Construction by Housing Type, 2008-2012

Year	Family	Senior	Individual/SRO	Homeowner	Total
2008	227	160	134	302	823
2009	176	24	407	339	946
2010	128	348	59	47	582
2011	67	0	140	11	218
2012	157	0	269	87	513
2012 Percent of Total	30.6%	0.0%	52.4%	17.0%	100%

Source: Planning Department, Mayor's Office of Housing, Successor Agency to the Redevelopment Agency

Note: Family units include projects with a majority of two or more bedroom units. Individual / SRO includes projects with a majority of one bedroom, residential care facilities, shelters, and transitional housing.

Inclusionary Housing

In 1992, the Planning Commission adopted guidelines for applying the City's Inclusionary Affordable Housing Policy. This policy required housing projects with 10 or more units that seek a conditional use (CU) permit or planned unit development (PUD) to set aside a minimum of 10% of their units as affordable units. In 2002, the Board of Supervisors legislated these guidelines into law and expanded the requirement to all projects with 10 or more units. In condominium developments, the inclusionary affordable ownership units would be available to households earning up to 100% of the AMI; below market inclusionary rental units are affordable to households earning 60% or less of the area median income (AMI). If a housing project required a conditional use permit, then 12% of the units would need to be made available at the same levels of affordability.

In August 2006, the inclusionary requirements were increased to 15% if units were constructed on-site, and to 20% if constructed off-site and is applicable to projects of five units or more. These increases will only apply to new projects. All projects in the pipeline at the time these changes were adopted will be exempt from these increases, except for projects that have not yet received Planning Department approval and those that will receive a rezoning that increases the amount of housing that can be constructed on their property. Table 21 shows inclusionary units completed from 2008-2012.

- In 2012, significantly more inclusionary units (125) were built than in the previous three years. The units built in 2012 represent an eleven-fold increase from the 11 inclusionary units provided in 2011. This significant increase is due to the overall economic recovery.
- Ninety-eight inclusionary units completed in 2012 were the result of the on-site requirement. The remaining 27 units are part of a Mission Bay redevelopment project.

Appendix A-1 provides a complete list of projects with five or more units constructed in 2012 with details of new construction with inclusionary units for those projects that have them.

In 2012, a total of \$1,536,683 was collected as partial payments of in-lieu fees for three projects. Appendix D is a summary of in-lieu fees collected since 2003.

TABLE 21.
New Inclusionary Units, 2008-2012

Year	Units
2008	379
2009	44
2010	40
2011	11
2012	125
TOTAL	599

Source: Planning Department, Mayor's Office of Housing

Affordability of Market Rate Housing

The San Francisco Bay Area remains one of the nation's most expensive housing markets, with housing prices remaining high despite drops in average housing costs.

- In 2012, rental prices for a two-bedroom apartment in San Francisco increased by 16% to \$3,000 from \$2,573 in 2011.
- In 2012, the median price for a two-bedroom home in San Francisco went up to \$655,170 or 33% more than 2011 (\$493,330). The 2012 median price for a two-bedroom home in the Bay Area region was \$436,440 or an 28% increase from the price in 2011.

- A San Francisco family of three with a combined household income that is 110% of the HUD median income (a household which can afford a maximum sales price of \$376,957 according to Table 18) would fall about \$278,213 short of being able to purchase a median-priced two-bedroom home (\$655,170).
- A three-person household with a combined household income at 80% of the median income could pay a maximum rent of \$1,799 or 60% of the median rent (\$3,000).

Table 22 gives rental and sales prices for 2003 through 2012. The high cost of housing continues to prevent families earning less than the median income from being able to purchase or rent a median-priced home in San Francisco.

TABLE 22. Housing Price Trends, San Francisco Bay Area, 2003-2012

Year	Rental (Two Bedroom Apartment)		For Sale (Two Bedroom House)	
	San Francisco	Bay Area	San Francisco	Bay Area
2003	\$2,023	N/A	\$607,140	\$460,800
2004	\$2,068	N/A	\$670,450	\$547,190
2005	\$2,229	N/A	\$737,500	\$619,010
2006	\$2,400	N/A	\$680,970	\$612,250
2007	\$2,750	N/A	\$664,060	\$566,440
2008	\$2,650	\$1,810	\$603,570	\$370,490
2009	\$2,695	\$1,894	\$611,410	\$409,020
2010	\$2,737	N/A	\$560,980	\$383,550
2011	\$2,573	\$1,818	\$493,330	\$339,730
2012	\$3,000	\$1,955	\$655,170	\$436,440

Source: SF-Rent.com for Apartment rental prices; Zillow in 2012. California Association of Realtors for home sale prices;

Notes: The California Association of Realtors Bay Area data do not include Napa and Sonoma Counties.

Affordable Housing Acquisition and Rehabilitation

Acquisition and rehabilitation involves non-profit housing organizations purchasing existing residential buildings in order to rehabilitate units for low- and very low-income persons. Table 23 shows units that have been rehabilitated through funding by the Mayor's Office of Housing (MOH) and the San Francisco Redevelopment Agency (SFRA). Often it is more economical to purchase and rehabilitate existing run-down units than to build new units. While many of these units are residential hotel (single room occupancy or SRO) units, acquisition and rehabilitation also includes homes for residential care providers, apartments for families, and conversions of commercial or industrial buildings for homeless persons and families.

The *Housing Inventory* reports units in such projects as adding to the housing stock only when new units are created as a result of the rehabilitation. For example, if a 50-unit SRO is rehabilitated and at the end, the SRO still has 50 units, then for the purposes of this report, these units would not be counted as adding to the housing stock.

In 2012, other than the major rehabilitation and conversion of non-residential uses, there were no major acquisition or rehabilitation of existing affordable units.

TABLE 23.

Units Rehabilitated, 2007-2011

Year	Units Acquired / Rehabilitated
2008	270
2009	16
2010	54
2011	329
2012	n/a
Total	669

Source: Mayor's Office of Housing, San Francisco Redevelopment Agency

Changes in Housing Stock by Planning District

This section discusses the City's housing stock by Planning District. Map 1 shows San Francisco's 15 Planning Districts.

Table 24 summarizes newly constructed units completed, altered units, and units demolished in each Planning District. The table also ranks each Planning District by its position for each of the ratings categories.

- The South of Market Planning District had the most new construction in 2012 with 376 units built or 47% of the total new construction. Moreover, with two units lost through demolitions and an additional 327 units added through conversion or alteration, it also had the highest net gain with 701 net new units or 53% of net new addition Citywide.

- The Downtown Planning District ranked second in net units gained (192 units or 15% of net units gained).
- The South Bayshore Planning District had the highest number of units demolished, with 113 units lost or 89% of the 127 total units lost through demolition.

Figure 8 shows total new housing constructed and demolished by San Francisco Planning Districts in 2012.

MAP 1.

San Francisco Planning Districts



TABLE 24. Housing Units Completed and Demolished by Planning District, 2012

No.	District Name	Units Completed	Rank	Units Demolished	Rank	Units Altered	Rank	Net Gain Housing Units	Rank
1	Richmond	2	10	-		14	4	16	8
2	Marina	26	5	6	2	(10)	15	10	9
3	Northeast	5	9	-		13	6	18	7
4	Downtown	-	13	-		192	2	192	2
5	Western Addition	70	4	-		(2)	14	68	5
6	Buena Vista	-	14	-		4	7	4	11
7	Central	12	7	6	3	14	5	20	6
8	Mission	88	3	-		90	3	178	4
9	South of Market	376	1	2	4	327	1	701	1
10	South Bayshore	24	6	113	1	1	11	(88)	15
11	Bernal Heights	-	15	-		2	8	2	14
12	South Central	7	8	-		-	13	7	10
13	Ingleside	181	2	-		1	12	182	3
14	Inner Sunset	2	11	-		2	9	4	12
15	Outer Sunset	1	12	-		2	10	3	13
---	TOTAL	794	---	127	---	650		1,317	---

Source: Planning Department

*Note: The "net gain housing units" calculation accounts for units lost/gained by alterations but those figures are not displayed.

FIGURE 8.

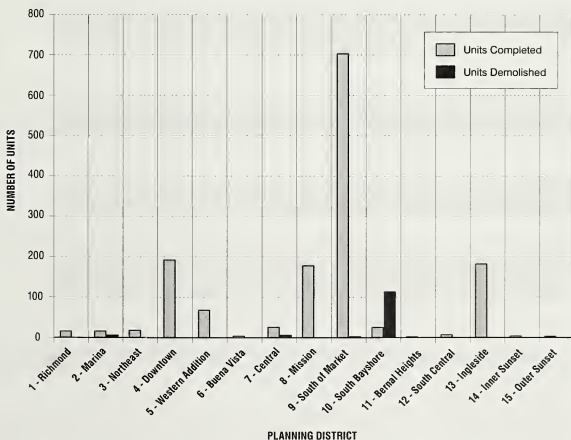
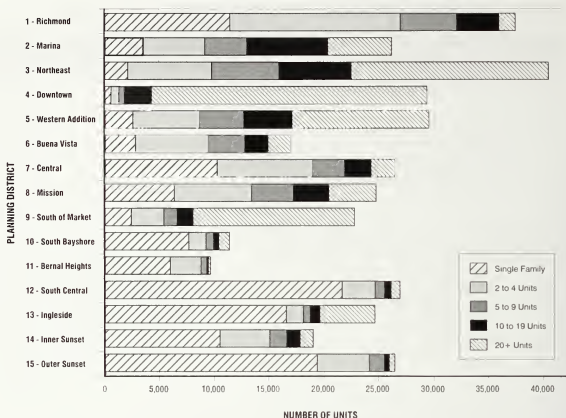
Units Completed
& Demolished by
Planning District,
2012

FIGURE 9.
San Francisco
Housing Stock
by Planning
District, 2012



Housing Stock by Planning District

Figure 9 shows the total overall housing stock by building type for the 15 San Francisco Planning Districts. Table 25 contains San Francisco housing stock totals by Planning District and shows the net gain since the 2010 Census.

- The Northeast and Richmond Planning Districts continue to have the highest number of overall units, having 40,490 units and 37,440 units respectively. The Northeast District accounts for 11% of the City's housing stock, while the Richmond Planning District accounts for 10%.
- The South Central, Outer Sunset, and Ingleside Planning Districts remain the areas with the highest number of single-family homes in San Francisco. Together these areas account for 46% of all single-family homes.
- The Richmond, Central, Northeast, and Mission Planning Districts are the areas with the highest numbers of buildings with two to four units, representing 20%, 11%, 10%, and 9% of those units respectively.
- In the "5 to 9 Units" category, the Northeast and Richmond Planning Districts have the highest numbers of those units with 16% and 13% respectively.
- The Marina and Northeast Planning Districts continue to have the highest share of buildings with 10 to 19 units. Thirty seven percent of the City's multi-family buildings with 10 to 19 units are in these districts.
- The Downtown Planning District has the largest stock of the city's high-density housing – almost 25,120 units. The Northeast Planning District is second with about 17,970 units. Eighty-five percent of all housing in the Downtown Planning District is in buildings with 20 or more units. This district accounts for 27% of all the high-density housing citywide. The Northeast Planning District, with 44% of its units in buildings with 20 units or more, claims 19% of the City's high-density housing.

TABLE 25.

San Francisco Housing Stock by Planning District, 2010-2012

Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
1. Richmond						
2010 ACS5	11,388	15,525	5,126	3,845	1,467	37,383
2011	(1)	20	-	-	20	39
2012	1	8	7	-	-	16
TOTAL	11,388	15,553	5,133	3,845	1,487	37,438
Percent of Total	30.4%	41.5%	13.7%	10.3%	4.0%	10.0%
2. Marina						
2010 ACS5	3,469	5,636	3,824	7,404	5,817	26,165
2011	1	(2)	-	-	(3)	(4)
2012	-	(2)	(6)	(8)	26	10
TOTAL	3,470	5,634	3,824	7,404	5,814	26,171
Percent of Total	13.3%	21.5%	14.6%	28.3%	22.2%	7.0%
3. Northeast						
2010 ACS5	2,080	7,621	6,147	6,585	17,965	40,462
2011	-	5	-	-	3	8
2012	-	16	-	2	-	18
TOTAL	2,080	7,642	6,147	6,587	17,968	40,488
Percent of Total	5.1%	18.9%	15.2%	16.3%	44.4%	10.8%
4. Downtown						
2010 ACS5	547	719	494	2,460	24,967	29,348
2011	-	2	-	-	(33)	(31)
2012	-	-	-	-	192	192
TOTAL	547	721	494	2,460	25,126	29,509
Percent of Total	1.9%	2.4%	1.7%	8.3%	85.1%	7.9%
5. Western Addition						
2010 ACS5	2,535	6,065	4,055	4,381	12,283	29,319
2011	1	-	-	-	141	142
2012	-	2	1	13	52	68
TOTAL	2,536	6,067	4,056	4,394	12,476	29,529
Percent of Total	8.6%	20.5%	13.7%	14.9%	42.2%	7.9%
6. Buena Vista						
2010 ACS5	2,777	6,633	3,339	2,099	2,062	16,950
2011	(3)	3	1	-	-	1
2012	-	4	-	-	-	4
TOTAL	2,774	6,640	3,340	2,099	2,062	16,955
Percent of Total	16.4%	39.2%	19.7%	12.4%	12.2%	4.5%
7. Central						
2010 ACS5	10,219	8,671	2,935	2,398	2,167	26,395
2011	(3)	15	(1)	-	-	11
2012	5	9	6	-	-	20
TOTAL	10,221	8,695	2,940	2,398	2,167	26,426
Percent of Total	38.7%	32.9%	11.1%	9.1%	8.2%	7.1%
8. Mission						
2010 ACS5	6,295	7,026	3,797	3,221	4,205	24,566
2011	1	4	2	0	-20	-13
2012	2	18	9	33	116	178
TOTAL	6,298	7,048	3,808	3,254	4,301	24,731
Percent of Total	25.5%	28.5%	15.4%	13.2%	17.4%	6.6%

CONTINUED >

Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
9. South of Market						
2010 ACS5	2,379	2,933	1,207	1,428	14,070	22,061
2011	-	22	-	-	(1)	21
2012	4	19	-	25	665	701
TOTAL	2,380	2,965	1,207	1,453	14,734	22,783
Percent of Total	10.4%	13.0%	5.3%	6.0%	64.7%	6.1%
10. South Bayshore						
2010 ACS5	7,614	1,614	700	514	890	11,404
2011	(3)	1	19	-	66	83
2012	-	(33)	(36)	(19)	-	(88)
TOTAL	7,611	1,582	683	495	956	11,399
Percent of Total	66.8%	13.9%	6.0%	4.3%	8.4%	3.0%
11. Bernal Heights						
2010 ACS5	5,926	2,796	537	130	199	9,629
2011	-	4	-	-	-	6
2012	-	-	-	-	-	2
TOTAL	5,928	2,802	537	130	199	9,637
Percent of Total	61.5%	29.1%	5.6%	1.3%	2.1%	2.6%
12. South Central						
2010 ACS5	21,602	3,005	858	589	800	26,866
2011	(10)	7	-	18	-	15
2012	1	1	5	-	-	7
TOTAL	21,593	3,013	863	607	800	26,888
Percent of Total	80.3%	11.2%	3.2%	2.3%	3.0%	7.2%
13. Ingleside						
2010 ACS5	16,497	1,565	606	900	4,832	24,424
2011	(4)	1	-	-	-	(3)
2012	8	1	-	-	173	182
TOTAL	16,501	1,567	606	900	5,005	24,603
Percent of Total	67.1%	6.4%	2.5%	3.7%	20.3%	6.6%
14. Inner Sunset						
2010 ACS5	10,450	4,528	1,555	1,226	1,188	18,951
2011	(2)	2	-	-	-	-
2012	2	2	-	-	-	4
TOTAL	10,450	4,532	1,555	1,226	1,188	18,955
Percent of Total	55.1%	23.9%	8.2%	6.5%	6.3%	5.1%
15. Outer Sunset						
2010 ACS5	19,321	4,750	1,385	442	495	26,427
2011	(5)	(1)	-	-	-	(6)
2012	1	2	-	-	-	3
TOTAL	19,317	4,751	1,385	442	495	26,424
Percent of Total	73.1%	18.0%	5.2%	1.7%	1.9%	7.1%
Treasure Island, Presidio, Golden Gate Park						
2010 ACS5	852.0	687.0	523.0	34.0	89.0	2,185.0
2011	-	-	-	-	-	-
2012	-	-	-	-	-	-
TOTAL	852.0	687.0	523.0	34.0	89.0	2,185.0
Percent of Total	39.0%	31.4%	23.9%	1.6%	4.1%	0.6%
Citywide						
2010 ACS5	123,951	79,774	37,088	37,656	93,496	372,535
2011	-26	83	21	18	173	269
2012	21	40	-14	46	1,224	1,317
TOTAL	123,946	79,897	37,095	37,720	94,893	374,121
Percent of Total	33.1%	21.4%	9.9%	10.1%	25.4%	100.0%

Housing Construction in the Bay Area

This section provides a regional context to the City's housing production trends. San Francisco is one of nine counties that make up the Bay Area.

- In 2012, Bay Area counties authorized 16,660 units for construction, 60% more than the 2011 authorizations of 10,422 units.
- Santa Clara (34%), San Francisco (23%), and Alameda (16%) counties accounted for almost three-quarters (73%) of the units authorized in 2012.
- In San Francisco, 99% of new housing is in multi-family buildings. Santa Clara (75%), Santa Mateo (72%), and Alameda (57%) also have a high percentage of authorized units in multi-family structures. Single-family housing units predominate in Solano (89%) and Napa (87%).

Map 2 shows the nine counties that make up the Greater San Francisco Bay Area. Table 26 shows the total number of units authorized for construction for San Francisco and the rest of the Bay Area for 2012. Figure 10 shows trends in housing construction by building type from 2003 to 2012.



MAP 2.

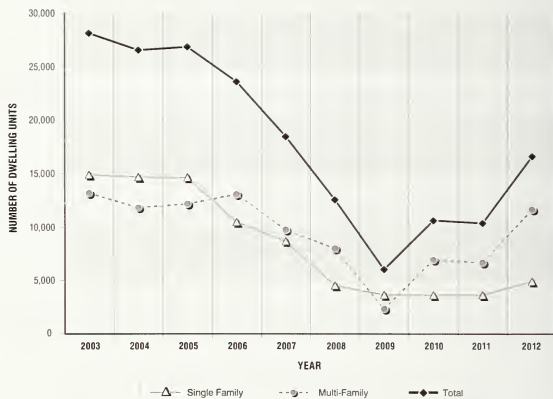
San Francisco Bay Area Counties

TABLE 26.

Units Authorized for Construction for San Francisco and the Bay Area Counties, 2012

County	Single-Family Units	Multi-Family Units	Total Units	Percent of Total
Alameda	1,119	1,508	2,627	16%
Contra Costa	1,188	949	2,137	13%
Marin	67	50	117	1%
Napa	133	20	153	1%
San Francisco	22	3,866	3,888	23%
San Mateo	264	671	935	6%
Santa Clara	1,432	4,245	5,677	34%
Solano	470	59	529	3%
Sonoma	279	318	597	4%
TOTAL	4,974	11,686	16,660	100%

Source: California Housing Foundation

FIGURE 10.
Bay Area Housing
Construction Trends,
2003-2012

Source: Construction Industry Research Board, 2003 to 2011 and California Housing Foundation for 2012

APPENDICES

Appendix A: Project Lists

This Appendix details major projects in various stages of the planning or construction process: projects under Planning Department review, projects that have been authorized for construction by the Department of Building Inspection, and projects that have been completed. A project's status changes over time. During a reporting period, a project may move from approved to under construction or from under construction to completed. Similarly, a project may change from rental to condominiums, or vice versa, before a project is completed or occupied.

Table A-1 details major market-rate housing projects with five or more units that were completed in 2012. This list also includes the number of inclusionary units in the project.

Table A-2 is comprised of major affordable housing projects with five or more units that were completed in 2012.

Table A-3 provides information for all projects with five or more units that were fully entitled by the Planning Department in 2012. These projects typically require either a conditional use permit, environmental review, or some other type of review by the Planning Commission or Zoning Administrator, or the Environmental Review Officer.

Table A-4 provides information for all projects with five or more units that were filed with the Planning Department in 2012. These projects require a conditional use permit, environmental review, or other types of review by the Planning Commission, Zoning Administrator, or the Environmental Review Officer. This list does not include projects submitted for informal Planning project review and for which no applications have been filed.

Table A-5 contains residential projects with five or more units authorized for construction by DBI in 2012.

Table A-6 is an accounting of affordable housing projects in the "pipeline" — projects that are under construction, or in pre-construction or preliminary planning with either the Mayor's Office of Housing or the San Francisco Redevelopment Agency.

Appendix B: Planning Area Annual Monitoring

Tables in *Appendix B* have been added to the *Housing Inventory* to comply in part with the requirements of Planning Code §341.2 and Administrative Code 10E.2 to track housing development trends in the recently-adopted community area plans. These plan areas also have separate monitoring reports that discuss housing production trends in these areas in greater detail.

Table B-1 details 2012 housing trends in recently adopted planning areas.

Table B-2 summarizes the units entitled by the Planning Department in 2012 by planning areas.

Table B-3 summarizes units gained from new construction in 2012 by planning areas.

Table B-4 summarizes units demolished in 2012 by planning areas.

Table B-5 summarizes units lost through alterations and demolitions in 2012 by planning areas.

Table B-6 summarizes affordable housing projects for 2012 in planning areas.

Appendix C: San Francisco Zoning Districts

Appendix D: In-Lieu Housing Fees Collected

Appendix E: Glossary

TABLE A-1.

Major Market Rate Housing Projects Completed, 2012

Address / Project Name	Total Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales or Rental Price
435 CHINA BASIN ST MADRONE MISSION BAY	329	27	1 BR: 104 2 BR: 225	Ownership	From \$600,000 From \$800,000
2235 03RD ST POTRERO LAUNCH	196	39	Studio: 33 1 BR: 81 2 BR: 81	Rental	From \$2,801
1200 OCEAN AVE AVALON OCEAN AVENUE	173	26	Studio: 16 1 BR: 83 2 BR: 74	Rental	From \$2,200 From \$2,300 From \$3,000
21 CLARENCE PLACE ARC LIGHT CO.	94	19	Studio: 9 1 BR: 35 2 BR: 30 3 BR: 1	Rental	not available
299 VALENCIA ST	36	4	1 BR: 12 2 BR: 24	Rental / Homeowner- ship	From \$2,600 From \$4,750 From \$400,000
1301 INDIANA ST MILLWHEEL SOUTH	32	4	1 BR: 1 2 BR: 14 3 BR: 17	Ownership	From \$569,000 From \$649,000 From \$729,000
1840 WASHINGTON ST THE WASHINGTONIAN	26	in-lieu	1 BR: 6 2 BR: 18 3 BR: 2	Ownership	From \$725,000
3500 19TH ST	17	in-lieu	1 BR: 5 2 BR: 12	Ownership	not available
411 VALENCIA ST	16	2	1 BR: 8 2 BR: 8	Ownership	From \$495,000 From \$695,000
750 SECOND ST	14	in-lieu	2 BR: 8 3 BR: 5	Ownership	not available
2829 CALIFORNIA ST THE HEIGHTS	13	2	2 BR: 9 3 BR: 7	Ownership	From \$1,900,000

Source: Planning Department, Mayor's Office of Housing; San Francisco Redevelopment Agency

TABLE A-2.

Major Affordable Housing Projects Completed, 2012

Address / Project Name	Developer / Sponsor	Units	Unit Mix	Tenure Type	AMI % Targets	Type of Housing
220 GOLDEN GATE AVE KELLY CULLEN COMMUNITY HOUSE	Tenderloin Neighborhood Development Corporation	174	Studio: 174	Rental	EVLI	Homeless
150 OTIS ST VETERANS COMMONS	Swords to Plowshares	76	Studio: 76	Rental	EVLI	Homeless
1345 TURK ST FILLMORE PARK	San Francisco Redevelopment Agency	32	1 BR: 2 BR: 3 BR:	Ownership	LI / Moder- ate	Low Income Moderate
1049 HOWARD ST A WOMAN'S PLACE	San Francisco Redevelopment Agency	25		Rental	LI	Family
350 GOLDEN GATE AV MADONNA RESIDENCE	St Anthony's	19		Rental	EVLI	Homeless
52 MIDDLE POINT RD HUNTERS VIEW HOPE SF	Mayor's Office of Housing / SF Housing Authority	13	1 BR: 2 BR: 3 BR:	Rental	LI	Family
11 WEST POINT RD HUNTERS VIEW HOPE SF	Mayor's Office of Housing / SF Housing Authority	11	1 BR: 2 BR: 3 BR:	Rental	LI	Family

Source: Planning Department, Mayor's Office of Housing; Successor Agency to the San Francisco Redevelopment Agency

TABLE A-3.

Major Housing Projects Reviewed and Entitled by Planning Department, 2012

Planning Case No.	Address / Project Name	Case Description	No. Units	Approval Date	Body	Action	Action No.
2012.0033 C	218 BUCHANAN ST	Proposal is to modify the project entitled per Case No. 2004-0773C. Revised proposal would alter the site layout, building footprint, and building height to change to a 10-story building with 40 off-street parking spaces. Wood Partners and Mercy Housin	440	16-Sep-12	CPC	Approved with Conditions	18693
2007.1035 C	350 8TH STREET	Seven building mixed-use development for 416 rental dws in 384,000-sf, with 50K-sf retail, 8,700-sf industrial/studio, and 409-space below ground parking on site of SOMA busyard, block bounded by 8th Street, Harrison, Ringold, Gordon, totaling 634,000-sf.	416	06-Dec-12	CPC	Approved with Conditions	18766
2012.0032 VX	100 VAN NESS AV	100 Van Ness is an existing 29 story office building that is currently 96% vacant. The proposal is to change the use from office to multi-family residential, renovate the interior of the building to create 399 multi-family residential units, and re-skin	399	14-Sep-12	ZA	Approved with Conditions	NA
2012.0556 X	401 HARRISON STREET	The project is to extend the performance period for the second phase of One Rincon Hill, originally approved under Motion No. 17077. Phase II of One Rincon will include a 450-foot residential tower, 299 dwelling units, 19 parking spaces.	299	24-May-12	CPC	Approved with Conditions	18636
2012.0045 CKR	5800 3RD STREET	The proposed project would construct buildings #3 and #4 as a replacement to the previously approved project case, # 2003.0672CE. Building #3 will construct 150 market rate residential units with 141 at-grade parking spaces. Building #4 would construct	271	25-Oct-12	CPC	Approved with Conditions	18730
2011.0744 C	MARKET OCTAVIA - PARCEL P	Mixed Use Development - Residential over podium garage, approx. 182 units of apartments, 128 spaces maximum parking, 180 sq ft of retail space, 90 sq ft of food space (at Octavia & Laguna Streets) in Hayes NC1, RTO Districts.	182	28-Jun-12	CPC	Approved with Conditions	18654
2007.0030 CMRZ	8 Washington Street	The proposed project would include the temporary removal of the existing Golden Gateway Tennis and Swim Club facility and the new construction of two mixed use buildings and outdoor health club facilities. The new buildings would include 170 residential u	170	22-Mar-12	CPC	Approved with Conditions	18567
2007.0456 BKX	181 FREMONT ST	66-story office mixed-use high-rise project, 796,933 total gsf, 878-ft, with class A office space (floors 2-44), 140 units residential (floors 47-65), with sky lobby, and auto lift-accessed 241-space 4-level underground parking; requiring demolition of 1	140	06-Dec-12	DCP	Approved	18763
2011.0176 C	1251 Turk Street	New construction for a 5-story, 50-foot tall, 98 affordable senior rental units.	98	02-Feb-12	CPC	Approved with Conditions	18535
2012.0110 CV	2175 MARKET STREET	Demolition of an existing gas station and construction of a new mixed use building with 88 dwelling units, 44 off-street parking spaces, and 6,286 sf of retail space.	88	04-Oct-12	ZA	Granted with Conditions	

CONTINUED >

Planning Case No.	Address / Project Name	Case Description	No. Units	Approval Date	Body	Action	Action No.
2011.0931 C	8 Octavia Blvd.	Construction of a new mixed-use building with approximately 49 residential units, 2,000 sq.ft. commercial space, and 25 off-street parking spaces plus one car-share space.	49	06-Sep-12	CPC	Approved with Conditions	18698
2006.0848 V	25-35 DOLORES STREET	Demolition of a vacant auto garage and construct a four-story 37-unit residential building with 38-parking spaces.	37	07-Dec-12	ZA	Granted with Conditions	
2012.0169 C	345 6TH STREET	Extension for approved Conditional Use Authorization 2005.0876 for existing building and reconstruction of residential over commercial w/parking.	36	03-May-12	CPC	Approved with Conditions	18609
2004.0976 C	376 CASTRO STREET	Demolition of a gas station and construction of a mixed-use building with 24 dwelling units, appx. 2,800 GSF of ground floor commercial use, and 24 off-street parking spaces.	24	02-Aug-12	ZA	Granted with Conditions	
2004.1004 C	1150 16TH STREET	Construction of a five-story building with 15 dwelling units and ground floor retail attached to an adjacent four-story building with ground floor retail and PDR units above. The total project includes 12 off-street parking spaces.	15	12-Apr-12	CPC	Approved with Conditions	18579
2005.0233 C	49 JULIAN AVENUE	Demolition of existing light industrial warehouse and construction of five-story eight-unit residential building. No off-street parking existing and eight proposed.	8	26-Jan-12	CPC	Approved with Conditions	18522
2007.1156V	350 LINDEN ST	Rear-yard modification (in lieu of a Variance -- Section 134(e)) in conjunction w/ a new 4-story bldg. containing 6 d.u.s + ground-floor retail use	6	24-Jan-11	ZA	Approved	

Source: Planning Department

TABLE A-4.

Major Housing Projects Filed at Planning Department, 2012

Planning Case No.	Address / Project Name	Case Description	Net Units
2012.0033	218 BUCHANAN ST	Modify Case No. 2004.0773C to alter the site layout, and building form and architecture. No change to overall unit count. Addition of 40 off-street parking spaces.	440
2012.0032	100 VAN NESS AV	Convert existing 29 story office building to create 399 multi-family residential units.	399
2012.0556	401 HARRISON STREET	Phase II of One Rincon will include a 450-foot residential tower, 299 dwelling units, 19 parking spaces.	299
2012.0045	5800 3RD STREET	Construct buildings #3 and #4 as a modification to the previously approved project (case # 2003.0672CE).	271
2012.0372	800 Brotherhood Way	Amendment of approved CU 2003.0536	182
2012.1025	325 FREMONT STREET	Construct a 250-foot tall residential tower, containing 119 dwelling units and 61 off-street parking spaces.	119
2012.1333	923 FOLSOM STREET	Demolition of an existing commercial office building and construction of 4 and 8-story, 114 unit mixed-use residential building.	114
2012.1218	645 TEXAS ST (aka 1300 22nd Street)	Construct a new 4-story, 94 unit residential project over 64 off-street parking spaces.	94
2012.0110	2175 MARKET STREET	Demolition of an existing gas station and construction of a new mixed use building with 88 dwelling units, 44 off-street parking spaces, and 6,286 sf of retail space.	88
2012.0325	344 FULTON STREET (PARCEL F)	Subdivide the lot and construct (1) a four-story, 60,049 sf Boys & Girls Club clubhouse and recreation facility and (2) a six-story building with 60-75 dwelling units and ground floor retail/active/common uses.	75
2012.0793	346 POTRERO AVENUE	Demolition of an existing car wash and construction of new 9-story mixed-use building with 75 dwelling units, and 3,375 sf of ground floor commercial, and 57 off-street residential parking spaces.	75
2012.1139	992 PERALTA AVENUE	Construct 5 story, 50 unit residential condominium building with 50 off street parking spaces.	50
2012.1553	1174 - 1178 FOLSOM ST	Merge two existing lots, demolition of two existing two-story structures, and the construction of new mixed-use 6 story, 65' tall building with basement parking. The proposed project would include retail on the first floor, offices on the second floor, and 42 studios on the third and fourth floors.	42
2012.0081	450 HAYES STREET	Construct a new 4-story residential building with 41 residential units, 20 parking spaces, and 3,300 sf of retail space and a full basement level.	41
2012.0169	345 6TH STREET	Extension for approved 2005.0876 for demolition of office building and reconstruction of residential over commercial w/parking.	36
2012.0083	400 GROVE STREET	Construct up to 34 residential units, 2,000 sf of retail space, and 17 below grade parking spaces.	33

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Planning Case No.	Address / Project Name	Case Description	Net Units
2012.0611	1601 LARKIN ST	CU Authorization to demolish existing vacant church and construct new 5-story building containing 27 dwelling units.	27
2012.0258	1500 PAGE ST	Renovation of SRO to provide up to 17 dwelling units and one manager's unit of affordable housing, community space for residents, bicycle parking and open space.	17
2012.1572	3420 18TH STREET	Demolish existing one-story commercial building and construct new five-floor building containing 16 residential units on four floors over ground floor garage containing 8 off-street parking spaces.	16
2012.1445	824 HYDE ST	Construct a 15-unit residential building.	15
2012.0095	1727 LOMBARD ST	Convert 52 tourist hotel guest rooms into group housing for post-secondary educational institution (Academy of Art University).	14
2012.0909	690 PAGE ST	Demolish the existing single-story, non-residential building and construct four three-unit residential buildings (12 total).	12
2012.0147	1785 15TH ST	Construction of a new 7,941 sf, 8-unit apartment building with no parking. The existing structure on site is to be demolished.	7
2012.0680	645 - 649 DUNCAN ST	Remodel including interior and exterior work; excavation greater than 20 ft to install new foundation and construct new garage.	5
2012.1454	5739 MISSION ST	Remove 2 unit apartments and build 7 unit condominium.	5

Source: Planning Department

TABLE A-5.

**Major Projects
Authorized for
Construction by
DBI, 2012**

Address	Units	Construction Type	Authorization Date
100 VAN NESS AV	399	Conversion	27-Dec-12
1380 07TH ST	393	New Construction	07-Sep-12
45 LANSING ST	320	New Construction	05-Sep-12
401 HARRISON ST	312	New Construction	03-Aug-12
900 FOLSOM ST	282	New Construction	14-Aug-12
55 09TH ST	273	New Construction	25-Jun-12
690 LONG BRIDGE ST	273	New Construction	16-Oct-12
701 LONG BRIDGE ST	188	New Construction	29-Jun-12
240 05TH ST	182	New Construction	06-Jul-12
1200 04TH ST	172	New Construction	29-Jun-12
1998 MARKET ST	114	New Construction	20-Mar-12
2121 03RD ST	105	New Construction	20-Jul-12
1800 VAN NESS AV	95	New Construction	27-Jul-12
255 BROADWAY *	75	New Construction	09-Aug-12
527 STEVENSON ST	67	Conversion	01-Jun-12
1400 07TH ST	65	New Construction	07-Sep-12
401 GROVE ST	63	New Construction	25-Jan-12
400 SOUTH VAN NESS AV	40	New Construction	15-Nov-12
1645 PACIFIC AV	38	New Construction	04-Oct-12
25 DOLORES ST	37	New Construction	27-Dec-12
1080 SUTTER ST	35	New Construction	27-Jan-12
1650 BROADWAY *	34	New Construction	10-Dec-12
2559 VAN NESS AV	27	New Construction	01-Nov-12
1600 MARKET ST	24	New Construction	20-Mar-12
2200 MARKET ST	22	New Construction	11-Jul-12
2652 HARRISON ST	20	New Construction	24-Oct-12
246 RITCH ST	19	New Construction	20-Apr-12
3500 19TH ST	17	New Construction	29-Jun-12
616 20TH ST	16	New Construction	09-Mar-12
537 NATOMA ST	13	New Construction	21-Jun-12
140 09TH ST	10	Conversion	08-Jun-12
3135 24TH ST	9	Conversion	04-Sep-12
1945 HYDE ST	7	Conversion	19-Jan-12
4801 MISSION ST	6	New Construction	12-Jul-12
350 LINDEN ST	6	New Construction	08-May-12

Source: Planning Department

TABLE A-6.
Major Affordable Projects in the Pipeline as of December 31, 2012

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
Currently Under Construction										
121 Golden Gate Ave. / St Anthony Senior Housing / Mercy Housing	18	71						89	90	New Construction
472 Ellis St / Arlington Preservation Mercy Housing	153							153	154	Rehabilitation
701-725 Golden Gate Ave Central Fwy Parcel C	20	79						99	100	New Construction
112 Middle Point Rd SFHA / Hunters View Phase I			106					106	106	New Construction
1180 Fourth St Mercy Housing	25		124					149	150	New Construction
535 Polson St at Essex St Transbay Block 11	120							120	120	New Construction
474 Natoma St / Natoma Court Bridge Housing			60					60	60	New Construction
1075 Le Conte Supportive Housing Providence Baptist	73							72	73	New Construction
1301 Divisadero St (Inclusionary)							4	4	32	New Construction
SUBTOTALS	409	150	290	-	-	-	4	852	885	
In Pre-Construction Planning										
72 Townsend St (Inclusionary)						7		7	74	New Construction
1450 Franklin (Inclusionary)						9		9	67	New Construction
5800 Third St (Inclusionary) Holiday Development							30	30	206	New Construction
1239 Turk St / Rosa Parks II SFHA / TNDC	20	78						98	98	New Construction
1100 Ocean Ave Phelan Loop Family Housing	25		45					70	70	New Construction
285 Broadway Chinatown Community Development Center	18		56					74	75	New Construction
909 Howard St Family Apartments TNDC			60					60	172	New Construction
1036 Mission St TNDC	20		80					100	100	New Construction
1500 Page St Aging / Pacific Institute				15				15	15	Rehabilitation

CONTINUED >

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
238 Taylor St / 160'x90' City St TND	30		123					153	153	New Construction
Mission Bay South Block 7 / China Bldg / 4th Street					198			198	200	New Construction
Carroll Avenue Senior Housing 5900 3rd Street / Lot 3	25	95						120	121	New Construction
800 Presidio / Booker T Washington	24		25					49	50	New Construction
Transbay Block 6 & 7 / Folsom & Beale			145					145	147	New Construction
55 Laguna Senior HUD 202		70						70	70	New Construction
55 Laguna Richardson Hall		39						39	40	Rehabilitation
200 Sixth St Hugo Hotel			50					50	50	New Construction
207 Cameron Wy / Alice Griffith Ph 1-3 SFHA / McCormack Baron Salazar / Lennar		303						303	306	New Construction
Hunters Point Shipyard Block 50						3		3	25	New Construction
Hunters Point Shipyard Block 51						7		7	63	New Construction
3155 Scott St / Edward II	24							24	25	Rehabilitation
SUBTOTALS	186	282	887	15	198	26	30	1,624	2,127	
In Preliminary Planning										
Hunters View HOPE SF Phases II & III SFHA / The Joint Stewart Company			54		187			241	241	New Construction
207 Cameron Wy / Alice Griffith Ph 4-5 SFHA / McCormack Baron Salazar / Lennar			197					197	198	New Construction
1400 Mission St Family Housing TND / Citizens Housing	30		120					150	150	New Construction
455 Fell St Central Fwy Parcel O			80					80	80	New Construction
102-104 Octavia Blvd Central Fwy Parcel U	35							35	35	New Construction
465 Hayes St Central Fwy Parcel K							24	24	24	New Construction
400 Folsom St at Fremont St Transbay Block 8								174	175	New Construction

CONTINUED >

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
270 Spear St Transbay Block 1								143	144	New Construction
1654 Sunnydale Ave. HOPE SF SFHA / Mercy Housing			306		700			1,006	1,006	New Construction
1095 Connecticut St / 751 Missouri St Poirero Terrace & Potrero Annex SFHA / Bridge Housing	606	90	286				30	836	962	New Construction
601 China Basin St Mission Bay South Parcel 6 East			134					134	135	New Construction
550 Mission Rock St Mission Bay South Parcel 3 East	99							99	100	New Construction
Hunters Point Shipyard Block 53								10	93	New Construction
Hunters Point Shipyard Block 54								5	48	New Construction
Hunters Point Shipyard Block 49			59					59	60	New Construction
3001 24th Street / Casa de la Mission		35						35	35	New Construction
SUBTOTALS	770	125	1,236	-	887	-	54	3,228	3,486	
TOTALS	1,365	557	2,413	15	1,085	26	88	5,704	6,498	

Source: Mayor's Office of Housing

Notes: TBD = To Be Determined; SFHA = San Francisco Housing Authority; TNDG = Tenderloin Neighborhood Development Corporation; CHP = Catholic Healthcare Partners; BHNC = Bernal Heights Neighborhood Center

TABLE B-1.

Housing Trends by Planning Area, 2012

Planning Area	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change in Number of Units
Balboa Park	-	173	-	-	173
Central Waterfront	122	32	-	196	228
East SoMa	500	25	-	123	148
Market-Octavia	674	40	4	80	116
Mission	94	47	-	11	58
Showplace Square/ Potrero Hill	464	-	2	(1)	(3)
Rest of City	2,034	477	121	241	597
San Francisco	3,888	794	127	650	1,317

Source: Planning Department

Note: Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

TABLE B-2.

Units Entitled by Planning Area, 2012

Planning Area	No. of Projects	Net Units Entitled
Balboa Park	-	-
Central Waterfront	1	1
East SoMa	2	37
Market-Octavia	8	1,198
Mission	5	15
Showplace Square/Potrero Hill	1	15
Rest of City	31	1,484
San Francisco Total	48	2,750

Source: Planning Department

TABLE B-3.

Housing Units Added by Building Type and Planning Area, 2012

Planning Area	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
Balboa Park	-	-	-	-	173	173
Central Waterfront	-	-	-	-	228	228
East SoMa	1	-	4	24	119	148
Market Octavia	1	(2)	1		116	116
Mission	-	5	20	33	-	58
Showplace Square	-	(3)	-	-	-	(3)
Subtotal	-	-	-	-	-	-
Rest of City	22	40	57	41	591	751
TOTAL	24	40	82	98	1,227	1,471

Source: Planning Department

TABLE B-4.

Units Demolished by Building Type and Planning Area, 2012

Year	Buildings	Units by Building Type				Total
		Single	2 Units	3 to 4 Units	5+ Units	
Balboa Park	-	-	-	-	-	-
Central Waterfront	-	-	-	-	-	-
East SoMa	-	-	-	-	-	-
Market Octavia	2	-	4	-	-	4
Mission	-	-	-	-	-	-
Showplace Square	1	-	2	-	-	2
Rest of City	20	-	4	32	85	121
TOTAL	23	-	10	32	85	127

Source: Planning Department

TABLE B-5.

Units Lost Through Alterations and Demolitions by Planning Area, 2012

Planning Area	Alterations					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
Balboa Park	-	7	-	-	-	-	1
Central Waterfront	-	7	-	-	-	-	-
East SoMa	-	7	-	-	-	-	-
Market-Octavia	-	7	-	-	-	-	-
Mission	-	7	-	-	-	14	21
Showplace Square/ Potrero Hill	-	-	-	-	-	2	2
Rest of City	38	15	1	3	65	68	
Total	39	22	1	3	65	84	

Source: Planning Department

TABLE B-6.

New Affordable Housing Constructed in Planning Areas, 2012

Planning Area	Affordable Units	Total Units	AMI Target	Tenure	Funding Source
Balboa Park					
1150 Ocean Av	26	173	Moderate	Ownership	Inclusionary
Central Waterfront					
2225 3rd Street	196	39	Low Income	Rental	Inclusionary
1301 Indiana St	4	32	Moderate	Ownership	Inclusionary
East SoMa					
178 Townsend St	94	19	Low Income	Ownership	Inclusionary
1049 Howard St	25	25	Very Low Income	Rental	?
574 Natoma St	2	11	Moderate	Ownership	Inclusionary
Market Octavia					
150 Otis St	76	76	Extremely Very Low Income	Rental	
299 Valencia St	4	40	Moderate	Ownership	Inclusionary
Mission					
411 Valencia St	2	16	Moderate	Ownership	Inclusionary

Source: Planning Department

TABLE C.

San Francisco Zoning Districts

Zoning	General Descriptions
Residential, House and Mixed Districts	
RH-1	Residential, House – One Family
RH-1(D)	Residential, House – One Family (Detached Dwellings)
RH-1(S)	Residential, House – One Family with Minor Second Unit
RH-2	Residential, House – Two Family
RH-3	Residential, House – Three Family
RM-1	Residential, Mixed – Low Density
RM-2	Residential, Mixed – Moderate Density
RM-3	Residential, Mixed – Medium Density
RM-4	Residential, Mixed – High Density
Residential Transit-Oriented Districts	
RTO	Residential Transit-Oriented
RTO-M	Residential Transit-Oriented, Mission
Residential-Commercial Districts	
RC-3	Residential-Commercial – Medium Density
RC-4	Residential-Commercial – High Density
Public District	
P	Public District
Neighborhood Commercial Districts	
NC-1	Neighborhood Commercial Cluster District
NC-2	Small-Scale Neighborhood Commercial District
NC-3	Moderate-Scale Neighborhood Commercial District
NC-S	Neighborhood Commercial Shopping Center District
NCD-24th-Noe	24th - Noe Valley Neighborhood Commercial District
NCD-Broadway	Broadway Neighborhood Commercial District
NCD-Castro	Castro Neighborhood Commercial District
NCD-Haight	Haight Neighborhood Commercial District
NCD-Inner Clement	Inner Clement Neighborhood District
NCD-Inner Sunset	Inner Sunset Neighborhood District
NCD-North Beach	North Beach Neighborhood Commercial District
NCD-Outer Clement	Outer Clement Neighborhood District
NCD-Polk	Polk Neighborhood Commercial District
NCD-Sacramento	Sacramento Neighborhood Commercial District
NCD-Union	Union Neighborhood Commercial District
NCD-Upper Fillmore	Upper Fillmore Neighborhood Commercial District
NCD-Upper Market	Upper Market Neighborhood Commercial District
NCD-West Portal	West Portal Neighborhood Commercial District

CONTINUED >

Zoning	General Descriptions
Neighborhood Commercial Transit Districts	
NCT-1	Neighborhood Commercial Transit Cluster District
NCT-2	Small-Scale Neighborhood Commercial Transit District
NCT-3	Moderate-Scale Neighborhood Commercial Transit District
NCT-24th-Mission	24th - Mission Neighborhood Commercial Transit District
NCT-Hayes-Gough	Hayes - Gough Neighborhood Commercial Transit District
NCT-Mission	Mission Neighborhood Commercial Transit District
NCT-Ocean	Ocean Neighborhood Commercial Transit District
NCT-SoMa	South of Market Neighborhood Commercial Transit District
NCT-Upper Market	Upper Market Neighborhood Commercial Transit District
NCT-Valencia	Valencia Neighborhood Commercial Transit District
Chinatown Mixed Use Districts	
CRNC	Chinatown Residential Neighborhood Commercial District
CVR	Chinatown Visitor Retail District
CCB	Chinatown Community Business District
South of Market Mixed Use Districts	
RED	South of Market Residential Enclave District
RSD	South of Market Residential Service District
SLI	South of Market Service-Light Industrial District
SLR	South of Market Light Industrial-Residential District
SSO	South of Market Service / Secondary Office District
Eastern Neighborhoods Mixed Use Districts	
MUG	Mixed Use - General District
MUO	Mixed Use - Office District
MUR	Mixed Use - Residential District
SPD	South Park Mixed Use District
UMU	Urban Mixed Use District
Downtown Residential Districts	
DTR-RH	Downtown Residential - Rincon Hill District
DTR-SB	Downtown Residential - South Beach District
DTR-TB	Downtown Residential - Transbay District
Commercial Districts	
C-2	Community Business District

CONTINUED >

Zoning	General Descriptions
Downtown Commercial Districts	
C-3-S	Downtown Commercial - Service District
C-3-G	Downtown Commercial - General District
C-3-R	Downtown Commercial - Retail District
C-3-O	Downtown Commercial - Office District
C-3-O(SD)	Downtown Commercial - Office (Special Development) District
Industrial Districts	
M-1	Light Industrial District
M-2	Heavy Industrial District
C-M	Heavy Commercial District
PDR-1-B	Production Distribution and Repair Light Industrial Buffer District
PDR-1-G	Production Distribution and Repair General District
PDR-1-D	Production Distribution and Repair Design District
PDR-2	Core Production Distribution and Repair District
Redevelopment Agency Districts	
MB-RA	Mission Bay Redevelopment Area Plan District
HP-RA	Bayview Hunters Point Redevelopment Area Plan District

Source: Planning Department

TABLE D.

In-Lieu Housing Fees Collected, Fiscal Years 2003-2012

Fiscal Year	Amount Collected
2003	\$ 959,411
2004	134,875
2005	2,623,279
2006	22,894,994
2007	3,845,113
2008	37,617,828
2009	(7,155,039)
2010	(10,246,292)
2011	(2,497,264)
2012	1,536,683
Total	\$49,713,588

Source: Planning Department, Mayor's Office of Housing

APPENDIX E.

Glossary

Affordable Housing Unit: A housing unit – owned or rented – at a price affordable to low- and middle-income households. An affordable rental unit is one for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco PMSA, utilities included. An affordable ownership unit is one for which the mortgage payments, PMI, property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco PMSA median income, assuming a 10% down payment and a 30-year, 8% fixed-rate loan.

Alterations: Improvements and enhancements to an existing building. At DBI, building permit applications for alterations use Forms 3 and 8. If you are not demolishing an existing building (Form 6) or newly constructing a new building (Forms 1 and 2), you are “altering” the building.

Certificate of Final Completion (CFC): A document issued by DBI that attests that a building is safe and sound for human occupancy.

Conditional Use Permit: A permit that is only granted with the consent of the Planning Commission, and not as of right.

Condominium: A building or complex in which units of property, such as apartments, are owned by individuals and common parts of the property, such as the grounds and building structure, are owned jointly by all of the unit owners.

Current dollars: The dollar amount for a given period or year not adjusted for inflation. In the case of income, it is the income amount in the year in which a person or household receives it. For example, the income someone received in 1989 unadjusted for inflation is in current dollars.

General Plan: Collection of Objectives, Policies, and Guidelines to direct guide the orderly and prudent use of land.

HMFA: HUD Metro FMR (Fair Market Rent) Area an urbanized county or set of counties with strong social and economic ties to neighboring communities. PMSAs are identified within areas of one million-plus populations.

Housing Unit: A dwelling unit that can be a single family home, a unit in a multi-unit building or complex, or a unit in a residential hotel.

Inclusionary Housing Units: Housing units made affordable to lower- and moderate-income households as a result of legislation or policy requiring market rate developers to include or set aside a percentage (usually 10% to 20%) of the total housing development to be sold or rented at below market rates (BMR). In San Francisco, this is usually 15%, and it applies to most newly constructed housing developments containing five or more dwelling units.

Median Income: The median divides the household income distribution into two equal parts: one-half of the households falling below the median household income and one-half above the median.

Pipeline: All pending development projects -- filed, approved or under construction. Projects are considered to be “in the pipeline” from the day they are submitted for review with the Planning Department, the Redevelopment Agency (SFRA), or the Department of Building Inspections (DBI), until the day the project is issued a Certificate of Final Completion by DBI.

Planning Code: A local law prescribing how and for what purpose each parcel of land in a community may be used.

Primary Metropolitan Statistical Area (PMSA): A PMSA is an urbanized county or set of counties with strong social and economic ties to neighboring communities. PMSAs are identified within areas of one million-plus populations.

Single Room Occupancy (SRO) Units: Residential hotel rooms, typically occupied by one person, lacking bathroom and/or kitchen facilities.

Temporary Certificate of Occupancy (TCO): Like a CFC, a TCO allows occupancy of a building pending final inspection.

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Mayor

Edwin M. Lee

Board of Supervisors

David Chiu, *President*

John Avalos

London Breed

David Campos

Katy Tang

Malia Cohen

Mark Farrell

Jane Kim

Eric Mar

Scott Weiner

Norman Yee

Planning Commission

Cindy Wu, *President*

Rodney Fong, *Vice-President*

Michael Antonini

Gwyneth Borden

Rich Hillis

Kathrin Moore

Hisashi Sugaya

Planning Department

John Rahaim, *Director of Planning*

Joshua Switzky, *Acting Director of Citywide Planning*

Teresa Ojeda, *Manager, Information and Analysis Group*

Adrienne Aquino, *Graphic Designer*

Gary Chen, *Graphic Designer*

Audrey Desmuke, *Planner*

Aksel Olsen, *Planner*

Michael Webster, *Cartographer*

